



## Case Issues View

The screenshot shows the Siebel Case Issues View. The top half is a form for case details, and the bottom half is a list of issues.

**Case Details Form:**

- Case:** Case # 160, Last Name: Hyland, Account: 999-54-1637, Referred By: California Student, First Name: Mary, Home Phone: (417) 265-3118.
- Case Status and Ownership:** Intake Person: SADMIN, Status: Open, Sub-Status: Unassigned, Date Received: 7/29/00 4:55:48 PM, Ombudsman: OKING, Date Closed: .
- Original Issue:** Category: Default, Sub Category: , Summary: "Customer has".
- Revised Issue:** Category: , Sub Category: , Summary: .
- Customer Expectation:** Category: , Sub Category: , Summary: .
- Other Fields:** Svc Agency: Direct Loans, Loan Type: Direct Stafford Su, Loan Status: , Web Notes: "1. Call Steve Niles, Manager in Borrower".

**Case Issues List:**

Issue #	Issue Category	Issue Sub Category	Issue Summary	Status
1-160D	Collection Practices	Fees Too High	test	Open
1-160S	Consolidation	Balance Incorrect	test	Open

### View Description:

This view allows an Ombudsman specialist to work on multiple issues which relate to a single problem for a customer under a single case. New issues must be entered through this view in order to be associated to the appropriate case. A toggle button is provided on the "Issues" applet (the lower half of this view) which allows the user to determine the most convenient way to enter or view Issue information, in either the form or list applet.

#### **OCTS Case Form Applet:** *top half of view*

The form applet displays all pertinent case information for a given case in a single, scroll-free display. The data displayed is that of the active case in the list applet of the view from which the user navigated to this view.

For a detailed data mapping please refer to Appendix B-2

#### **OCTS Issue List Applet / OCTS Issue Form Applet:** *bottom half of view*

This applet has a toggle button in its top, center section. This button allows the user to choose between the Issue List Applet or the Issue Form Applet.

*Issue List Applet:* While the list applet may be used to enter or update activities, its primary purpose is to provide a list of all of the issues that are associated with a particular case. If the user wishes to update an issue, he or she may enter the new information directly into the list applet or click on the toggle button to view and edit the issue in the form applet.

For a detailed data mapping please refer to Appendix B-3

*Issue Form Applet:* This form applet serves as the primary place from which to enter new issue information or to update information in an existing issue. The form applet allows all pertinent issue information to be displayed on a single screen. Any issue entered in this view will be associated with the case displayed in the top half of the view.

For a detailed data mapping please refer to Appendix B-4

